

FINANCIALFORCE



# SALESFORCE SEES CUSTOMERS IN FULL COLOR

A FINANCIALFORCE CUSTOMER STORY







# ABOUT

Founded in 1999, Salesforce is the world's #1 Customer Relationship Management (CRM) company and THE Customer Success Platform. Salesforce was an early adopter of FinancialForce PSA, using the product to successfully run its global professional services business.

COMPANY SIZE

Enterprise

FF PRODUCT

PSA

HEADQUARTERS

San Francisco

INDUSTRY

Software

# MEASURES OF SUCCESS

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2X

INCREASE IN PROJECT CREATION

86%

FASTER UTILIZATION CALCULATIONS

24/7

REAL-TIME PROJECT STATUSES





# BUSINESS CHALLENGES

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Prior to FinancialForce, Salesforce ran two disparate systems with no overall view into projects. Extracting key information was time consuming, and it became increasingly difficult to share real-time information across the business. Services Operations also acted as a single point of contact for all project queries, creating bottlenecks. After running NetSuite side-by-side with FF PSA, Salesforce chose to move its entire professional services organization to FinancialForce.

# MAKING THE SWITCH TO PSA



## DEEPER PROJECT INSIGHTS

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FinancialForce improved utilization, project margins, and visibility into project profitability—resulting in substantial time savings. Salesforce teams can now view real-time project statuses on vivid dashboards and effectively manage resource capacity.

## 100% INCREASE IN PROJECT CREATION

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By automating project creation using FinancialForce PSA, double the amount of projects are created in the system each day. Monthly utilization calculations are also generated in 2 days, versus 2 weeks—an 86% decrease in time.

## POWERFUL RESOURCE MANAGEMENT

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PSA's Resource Planner has in turn saved users several hours per week originally dedicated to data entry. In addition, Project Managers have gained visibility into hours entered vs. hours assigned—enabling them to adjust swiftly when budgets fall off track.





# ONE TEAM, ONE TOOL

FinancialForce PSA has enhanced communication on global projects across Salesforce's professional services division. Project burn reports, which used to take half a day to extract, are pulled from PSA in seconds. Real-time information has also led to self sufficiency.

For Salesforce's executive team, FinancialForce now powers a complete view of the company's global project pulse that they can access in real-time, from anywhere.

[REQUEST DEMO](#)





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**ONE OF OUR BIGGEST WINS  
WAS PUSHING IN UTILIZATION.  
WE COULDN'T LIVE WITHOUT  
FINANCIALFORCE. IT'S INGRAINED  
IN WHAT WE DO.**

**MARK CONKLIN**

DIRECTOR SERVICES SYSTEMS AND TOOLS, SALESFORCE



FinancialForce is the leading cloud ERP for the new services economy. The #1 ERP native to the Salesforce platform, FinancialForce unifies data across the enterprise in real-time, enabling companies to rapidly evolve their business models with customers at the center.

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